



iHotelierSM

Loyalty Program User Guide

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How to Use This User's Guide

This User's Guide is divided into two major sections, Guest Experience, and Setting Up a Loyalty Program. Each section starts with an overview of the functionality and benefits. Within each process area, there may be multiple processes. Step-by-step instructions are provided for each process.

When appropriate, there may be references to a Web page section. This section includes customer Web page samples where the results of your setup or update procedures can be viewed from the customer perspective.

Terminology Used in This Guide

This guide uses the following common terminology:

Menu	Horizontal bar at the top of the iHotelier Admin area. Clicking any selection on the menu displays the navigation list and the first screen for that menu (Reports, Hotel Setup, Update/Modify, Yield Mgmt, Packages, Group/RFP, Travel Agent, Marketing Tools).
Navigation list	Vertical list on the left side of the screen containing links to folders and forms. The list will change for each menu selection.
Main window	The large area to the right of the Navigation list. The selected form, table, or calendar displays in this area.
Web pages	The resulting display of the information entered through iHotelier Admin, as a customer would view it.

Conventions Used in This Guide

This manual uses the following typographical conventions:

Bold	Bold print is used for menu items and sections from the navigation list. It is also used for field names (field names are also in this blue color).
<u>Underline</u>	Underlining is used for references to a section of the guide. Blue text that is underlined is a hyperlink to the named section.
[]	Brackets are used for variable names. For example, when explaining to a room type, the procedures may refer to the [Room Type] description, where multiple room types would use the same procedures.
Graphics	Graphics aligned to the left of the page are full screenshots from the application. Horizontally centered graphics are sections of the full screenshot.

Prerequisite Knowledge

This manual assumes that the reader has a basic knowledge of the Hospitality industry and has basic computer skills including the Windows Operating System, particularly Microsoft's Internet Explorer browser.

The iHotelier product has many features. There is no unique order in which they must be used, allowing you to create your own property strategy.

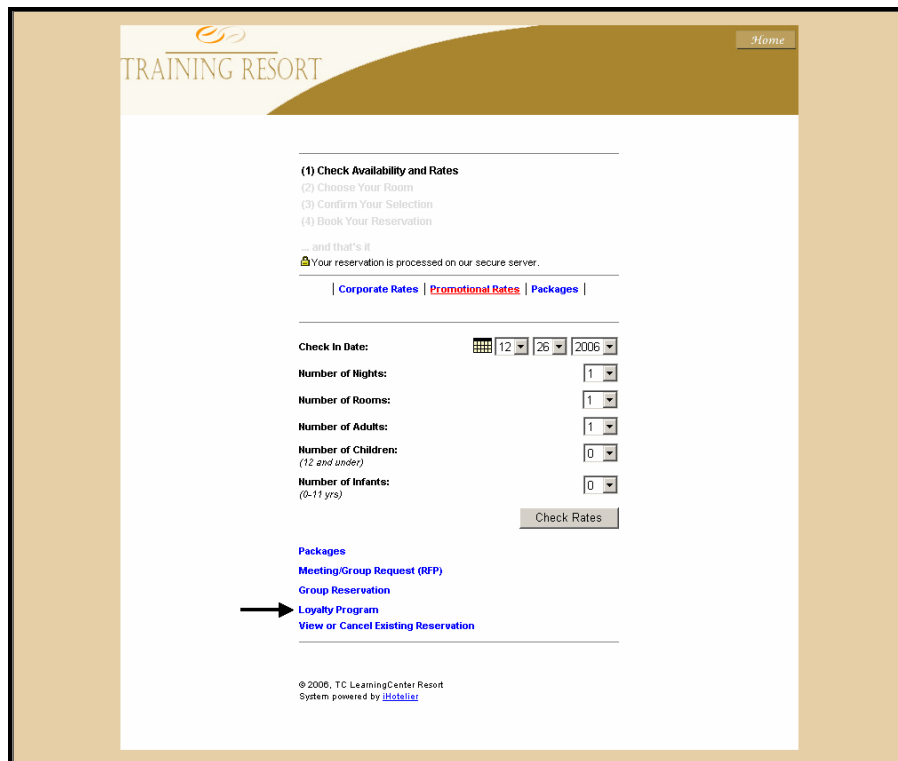
Symbols Used in This Guide

- ❖ **Benefit** to the client or customers of the client.
- ☒ **Best Practice** or recommendations for use of a field or function.
 - ☑ **Expected Results** of the previous procedure step often displaying the iHotelier application screens or noting expected impact to Web booking pages (HTML/Multi-step Booking pages or OneScreen).
- ▼ **Drop-down list** indicating a selection from a list of options.

The Loyalty Program Guest Experience

The Loyalty Program is an optional feature of iHotelier. Contact your TravelCLICK Sales representative if you want this feature installed.

When guests arrive at your hotel's booking page, they are presented with a number of options. They can begin an individual or group reservation process, shop for a room-inclusive package, make a reservation as a travel agent, view, change, or cancel an existing reservation, or take advantage of your property's Loyalty Program. This document addresses the Loyalty Program guest experience.




- ☑ When guests click the **Loyalty Program** link the Loyalty Program login page displays.

The screenshot shows a web page for the Loyalty Program Login. At the top left, there is a logo for 'iHotelier' and the text 'TRAINING RESORT'. At the top right, there is a 'Home' link. The main heading is 'Loyalty Program Login'. Below this, there are two input fields: 'Email:' and 'Password:'. To the right of the 'Password:' field is a 'Log in' button and a link 'Forgot your password, click here'. Below the login section, there is a link 'If you are not registered, please click here to join.'.

- A) Registered guests can enter their email address and password and click the **Log in** button to navigate to the Loyalty Program page. Guests who have forgotten their passwords can click the **Forgot your password, [click here](#)** link to have their password sent to their email address.
- B) New guests can register by clicking the **If you are not registered, please [click here to join](#)** link to register for the Loyalty Program.

- Registered guests** will have the option to make a reservation or update their personal information.


Home

TRAINING RESORT

Four easy steps to book your room:

- (1) Check Availability and Rates
- (2) Choose Your Room
- (3) Confirm Your Selection
- (4) Book Your Reservation

... and that's it

Loyalty Member Promotions Availability Calendar

Select Dates:

September 2007							October 2007						
S	M	T	W	Th	F	S	S	M	T	W	Th	F	S
					1		1	2	3	4	5	6	
2	3	4	5	6	7	8	7	8	9	10	11	12	13
9	10	11	12	13	14	15	14	15	16	17	18	19	20
16	17	18	19	20	21	22	21	22	23	24	25	26	27
23	24	25	26	27	28	29	28	29	30	31			
30													

Calendar Legend:

- Fun n Sun Package
- Standard corporate rate, ID required at check in.
- Rate exclusive for the Gold Club Members
- Dates with multiple promotions Color

Check In Date:

Check Out Date:

Number of Nights:

Number of Adults:

Number of Children:
(12 and under)

Number of Infants:
(0-11 yrs)

[View your profile](#)

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System powered by [iHotelier](#)

How to Register for the Loyalty Program

To register for the Loyalty Program, Guests click the **If you are not registered, please [click here](#) to join** link on the **Loyalty Program Login** page to navigate to the Loyalty Program Registration page.

The screenshot shows a web page for 'TRAINING RESORT' with a 'Home' link in the top right. The main heading is 'Loyalty Program Login'. Below this, there are two input fields: 'Email:' and 'Password:'. A 'Log in' button is positioned below the password field. To the right of the 'Log in' button is a link: 'Forgot your password, [click here](#)'. Below these elements, a message reads: 'If you are not registered, please [click here](#) to join.' A red arrow points to the 'click here' link in this message.

- ☑ The **Loyalty Program** Registration form displays.

TRAINING RESORT [Home](#)

Bronze Club Group Membership Form

Welcome to our Loyalty Program!
Register on our website today and join our fabulous guest program. By becoming a member you are now eligible to receive news about exclusive rates, packages and promotions offered only to our Loyalty Program members. These benefits will only apply when you confirm the Loyalty Program Rate directly with our hotel.

[If you are already registered, please click here to proceed.](#)

A {

Title

*FirstName

*LastName

*Email

*Password

*PasswordVerify

Address

Address2

City

State

Zip

Country

PhoneDay

PhoneEvening

Fax

B

Additional Questions:

Do you prefer Smoking or Nonsmoking?

Do you prefer High or Lower Floor?

Do you prefer feather or foam pillows?

Comments

C *Required Fields

- A) Guests complete the personal information fields on the Loyalty Program Registration form. The fields marked with an asterisk (*) are required. NOTE: in the Administration setup the property can specify which fields they would require.
- B) Optionally, guests can indicate their preferences and add any additional comments or requests in the **Additional Questions** sections. NOTE: in the Administration setup the property can add whatever additional information they would like the guest to provide.
- C) When the fields on the form are completed, the guests click the **Join Now** button to submit the reservation form.

Upon completion of the form, the guest is sent an automated confirmation email and within the system is redirected to the make a reservation with the default Promotion available for booking. To learn more about the default Promotion please see the Promotions section of this User Guide.

Making a Booking

After members have successfully logged in, they have the option to update email and password information by clicking the [View Your Profile](#) button or make a booking from the Promotions Availability Calendar. When guests update their information and click the **Change** button, the screen re-displays reflecting the changed information.

Making a booking with promotions is an easy multi-step process. Guest's must first select their desired dates from the **Promotions Availability Calendar** and then choose their desired room by clicking **Check Rates** at the bottom of the page. More information on the Promotions Available Calendar is available within this Guide. Please refer to the Multi-Step Booking Engine User Guide for more detail on booking procedures.

Four easy steps to book your room:

- (1) Check Availability and Rates
- (2) Choose Your Room
- (3) Confirm Your Selection
- (4) Book Your Reservation

... and that's it

Loyalty Member Promotions Availability Calendar

Select Dates:

September 2007							October 2007						
S	M	T	W	Th	F	S	S	M	T	W	Th	F	S
						1	1	2	3	4	5	6	
2	3	4	5	6	7	8	7	8	9	10	11	12	13
9	10	11	12	13	14	15	14	15	16	17	18	19	20
16	17	18	19	20	21	22	21	22	23	24	25	26	27
23	24	25	26	27	28	29	28	29	30	31			
30													

Clear Dates

Calendar Legend:

- Fun n Sun Package
- Standard corporate rate, ID required at check in.
- Rate exclusive for the Gold Club Members
- Dates with multiple promotions Color

Check In Date: [] [] [] []

Check Out Date: [] [] [] []

Number of Nights: []

Number of Adults: 1 []

Number of Children: 0 []
(12 and under)

Number of Infants: 0 []
(0-11 yrs)

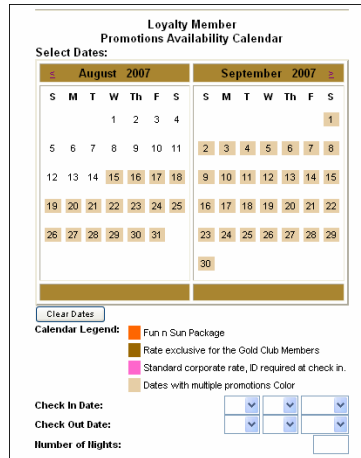
Check Rates

[View your profile](#)

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Promotions Availability Calendar

The Promotions Availability Calendar is interactive to allow a Loyalty Member to see all Promotions they are eligible to book and on what days they are available. The Calendar contains two (2) distinct areas, the date selection area and the Calendar legend.



Calendar Legend

The Legend displays each Promotion name and its corresponding color code that is associated to the Guest's loyalty profile. There is also a designated color that appears when multiple promotions are available on one day. When a guest places their mouse over a day in the date selection area that is designated with multiple promotions, a small pop-up displays with the available promotions color codes.



Date Selection

The date selection area is where Guests are able to view what promotions are available on any given day along with selecting specific days for their desired stay that then auto populate the **Check In Date**, **Check Out Date** and **Number of Nights** fields.

To select a date, the guest must click on a date within the calendar. The first selected dates populates as the Check In Date. The second date clicked populates as the Check Out Date with all days in between automatically highlighting in the calendar and the number of nights auto-calculating in the Number of Nights field below. To clear dates selected, click located in the lower left hand corner beneath the calendar.

Loyalty Member Promotions Availability Calendar

Select Dates:

August 2007							September 2007						
S	M	T	W	Th	F	S	S	M	T	W	Th	F	S
			1	2	3	4							1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31		23	24	25	26	27	28	29
													30

Calendar Legend:

- Fun n Sun Package
- Rate exclusive for the Gold Club Members
- Standard corporate rate, ID required at check in.
- Dates with multiple promotions Color

Check In Date:

Check Out Date:

Number of Nights:

Setting Up a Loyalty Program

The Loyalty Program is an optional feature of iHotelier. Contact your TravelCLICK Sales Representative if you want this feature installed.

This section of the guide reviews the processes for creating join (and additional) forms, viewing loyalty guest lists, and analyzing loyalty program statistics.

How to Design a Membership Form for Loyalty Groups

The **Loyalty Join Form Setup** form allows you select fields from a standard iHotelier setup template and customize your text to design a guest profile membership form for a loyalty program.

Access

Use the navigation list to access the **Loyalty Join Form Setup** form:

- ❑ Select the **Marketing Tools** menu
- ❑ Select **Loyalty Program** from the Navigation list (to expand the folder)
- ❑ Select **Join Form** from the expanded folder

Loyalty Join Form Setup form displays

Loyalty Join Form Setup

Language:

Head:

Title:

Comment: ex: By becoming a member of the Direct Booking Program you will be eligible to receive news offered only to our Direct Booking Program members.

Links:

Link to Loyalty Guest Login: ex: If you are already registered, please click here to proceed.

Required Fields:

Statement: ex: * Required Fields

Required Marker: ex: *

Edit Fields:

Field:	Label:	use:	required:
Title	<input type="text" value="Title"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FirstName	<input type="text" value="*FirstName"/>	required	required
LastName	<input type="text" value="*LastName"/>	required	required
Initial	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input type="text" value="*Email"/>	required	required
Password	<input type="text" value="*Password"/>	required	required
PasswordVerify	<input type="text" value="*PasswordVerify"/>	required	required
Address	<input type="text" value="*Address"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address2	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="text" value="*City"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
State	<input type="text" value="*State"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip	<input type="text" value="*Zip"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Country	<input type="text" value="*Country"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PhoneDay	<input type="text" value="*Phone"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PhoneEvening	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fax	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Submit Button:

Label: ex: Send

The field descriptions and procedures for the **Loyalty Join Form Setup** form follow:

- Language:** Select a language from the drop-down list.
- Title:** Enter a title for this membership form (e.g. Bronze Club Group Membership Form).
- Comment:** Enter the text as that you want to display at the top of the form. For example, the text could include a description of the program and/or procedures for completing the form.
- Link:** Enter the text for the loyalty guest program link that points to the login page. (e.g. Go back if you are already registered and want to make a booking)
- Required Fields—
Statement:** Enter text that explains that some fields are required and how they are designated.
- Required Fields—
Required Marker:** Enter the marker different from asterisk (*) that you prefer to use to indicate a required field. If you want to use an asterisk (*), leave this field empty and add the asterisk as part of the name of the field

Edit Fields: In this section, indicate which fields you want to use on your membership form and which fields you want to require the guest to complete. Click a box (to place a checkmark in it) to select it for the field. The following fields are available for selection:

- Title
- Initial
- Address
- Address2
- City
- State
- Zip
- Country
- PhoneDay
- PhoneEvening
- Fax

These fields are as automatically required fields by the system:

- First Name
- Last Name
- Email
- Password
- Password Verify

You can use the field labels shown on this form or edit them to meet your specific needs. **Note: If you leave a field blank, a blank field with no field label will display on the guest's join form.**

Submit Button--Label: Enter the text you want to display on the **Submit** button (e.g. Join Now). If you leave this blank, the text will be "Submit".

Submit: Click the **Submit** button to complete your membership form design.

How to Add Fields to a Loyalty Group Membership Form

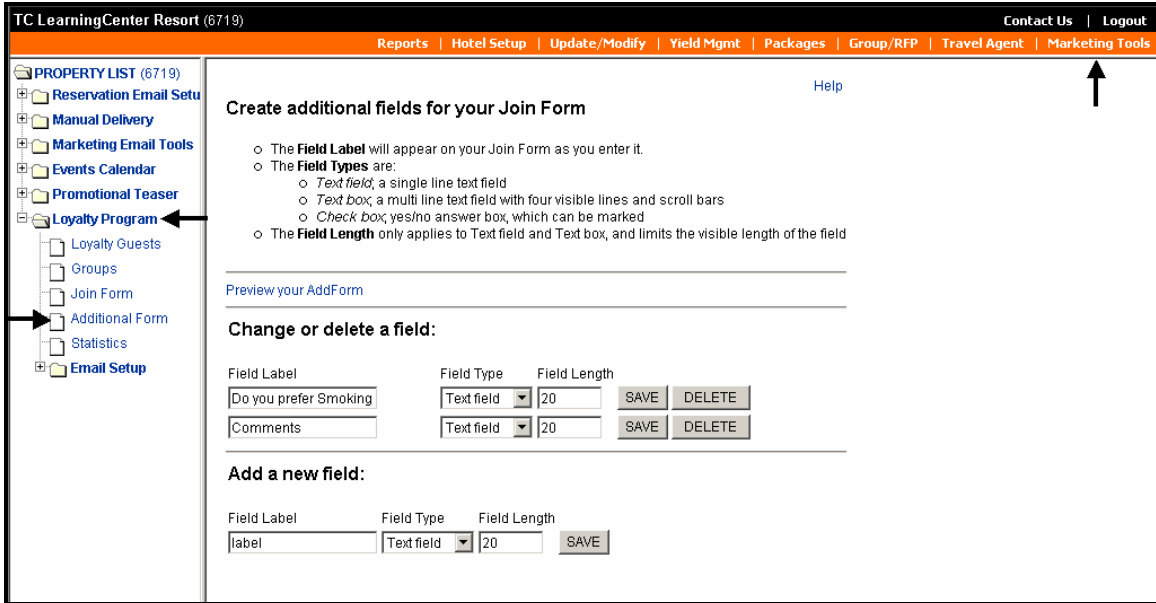
The **Additional Membership Fields** form allows you to add additional fields to capture guest preferences or comments to your loyalty program membership form. This form also allows you to select the field label field type, and field length of the additional fields to meet your needs. It also allows you to delete any of the additional fields you have added to your membership form.

Access

Use the navigation list to access the **Additional Membership Fields** form:

- Select the **Marketing Tools** menu

- ❑ Select **Loyalty Program** from the Navigation list (to expand the folder)
- ❑ Select **Additional Form** from the expanded folder



- ☑ The Additional Membership Fields form displays.

[Help](#)

Create additional fields for your Join Form

- The **Field Label** will appear on your Join Form as you enter it.
- The **Field Types** are:
 - *Text field*, a single line text field
 - *Text box*, a multi line text field with four visible lines and scroll bars
 - *Check box*, yes/no answer box, which can be marked
- The **Field Length** only applies to Text field and Text box, and limits the visible length of the field

[Preview your AddForm](#)

Change or delete a field:

Field Label	Field Type	Field Length		
<input type="text" value="Do you prefer Smoking"/>	<input type="text" value="Text field"/> ▼	<input type="text" value="20"/>	<input type="button" value="SAVE"/>	<input type="button" value="DELETE"/>
<input type="text" value="Comments"/>	<input type="text" value="Text field"/> ▼	<input type="text" value="20"/>	<input type="button" value="SAVE"/>	<input type="button" value="DELETE"/>

Add a new field:

Field Label	Field Type	Field Length	
<input type="text" value="label"/>	<input type="text" value="Text field"/> ▼	<input type="text" value="20"/>	<input type="button" value="SAVE"/>

To add a field to your membership form, start with the **Add a New Field** section of this form. When you click the **Save** button for the new field, it is moved to the **Change or Delete a Field** section of the form, where you can update or delete the field, if needed. With the exception of the **Delete** button, the field descriptions for both sections are the same.

The field descriptions and procedures for the **Additional Membership Fields** form follow:

- Field Label:** Enter a field label, as you want it to appear on the membership form.
- Field Type:** ▼ Select a field type from the drop-down list:
- Text field (creates a single-line text field)
 - Text box (creates a multi-line box)
 - Check box (creates an on/off indicator)
- Field Length:** For text fields and text boxes, enter the length of the field.

Save: Click the **Save** button to add/update the additional fields on your membership form design.

Delete: Click the **Delete** button to remove a field from your membership form design.

- When you click the **Save** button for the **Add a New Field** section, the new field displays in the **Change or Delete a Field** section.

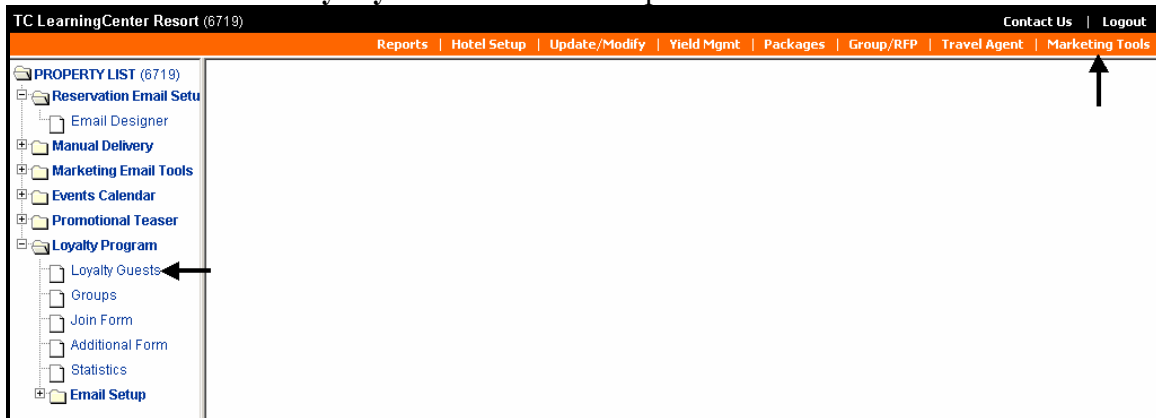
How to View Member Lists for Loyalty Groups

The **Loyalty Guests** table allows you to view a list of all or new loyalty guests that have joined a loyalty groups during a selected date range. After you specify the date range and click the **Go** button, the table lists all loyalty guests that match your entries.

Access

Use the navigation list to access the **Loyalty Guests** table:

- Select the **Marketing Tools** menu
- Select **Loyalty Program** from the Navigation list (to expand the folder)
- Select **Loyalty Guests** from the expanded folder




- The **Loyalty Guests** table displays in the main window.

[Help](#)

Loyalty Guests

View: All Loyalty Guests Join Date Start: Dec 1 2006 Join Date End: Jan 25 2007 Go

Last Name	First Name	Address	City	State	Zip	Country	Email	Join Date	
Public	John	123 Main Street	Chicago	IL	60601	US	chill@travelclick.net	12/12/2006	Details
Anderson	Michael	3100 Gaston Rd	Sugar Land	TX	77890	US	ma@aol.com	12/06/2006	Details
Peterson	Adam	3100 Richmond Ave	Houston	TX	77098	US	lharvey@travelclick.net	12/06/2006	Details
Smith	Kim	4567 Rustic Hill	Los Angeles	CA	89456	US	Ksmith@aol.com	12/06/2006	Details

New Guests are marked **bold** 

The field descriptions and procedures for the **Loyalty Guests** table follow:

View: ▼ Select one of the following from the drop-down list:

- All Loyalty Guests
- New Loyalty Guests

Join Date Start: Select a month, date, and year for the start date of the date range.

Join Date End: Select a month, date, and year for the end date of the date range.

Go: Click the **Go** button to view the **Loyalty Guests** table for the list and dates selected. Each row of the table displays one guest's information.

Last Name: The guest's last name (new guests are in bold print).

First Name: The guest's first name.

Address: The guest's street address.

City: The guest's city.

State: The guest's state.

Zip: The guest's zip code.

Country: The guest's country.

Email: The guest's email address.

Join Date: The date the guest joined the loyalty program

Details: Click the [Details](#) link to open the **Loyalty Guest Modify** form, where you can view the detailed information for the guest and modify or delete guest information, if needed.



Click the Microsoft Excel icon to export the **Loyalty Guest** table to an Excel spreadsheet.

When you click the [Details](#) link, the **Loyalty Guest Modify** form displays.

How to Modify Loyalty Guest Information

The **Loyalty Guest Modify** form allows you to view detail information for the guest selected from the **Loyalty Guests** table. This form also allows you to update information for the fields selected from the **Loyalty Join Form Setup** form and the **Additional Membership Fields** form. In addition, it allows you to create Promotion Associations. Guest information can also be deleted from this form.

Access

There is no direct access to the **Loyalty Guest Modify** form from the navigation list. It can only be accessed through the **Loyalty Guests** table by clicking the [Details](#) link.

Loyalty Guest Modify

First Name:

Last Name:

Join Date:

Email:

Address1:

Address2:

City:

Zip:

Day Phone:

Evening Phone:

State:

Country:

Do you prefer Smoking or Nonsmoking?:

Do you prefer High or Lower Floor?:

Do you prefer feather or foam pillows?:

Comments:

Guest is new:

Select Promotions:

Available Promotions

- Default Promotion
- Silver Club Members

Selected Promotions

- Bronze Club
- Bronze Club
- Bronze Club
- Gold Club Members

View Associated Promotions

Promotion Code	Promotion Name	Rate Plan	From	To	No. of Reservations	Booked Room-nights
1	Bronze Club	Fun n Sun Package	12/09/2005	08/11/2008	1	2
2	Gold Club Members	Gold Club Rate	12/09/2005	08/11/2008	0	0
4	Bronze Club	Special	08/11/2007	08/11/2008	0	0
5	Bronze Club	Corporate Rate	08/11/2007	08/11/2008	0	0

The field descriptions and procedures for the **Loyalty Guest Modify** form follow:

Guest Information Fields: In this section, the guest information fields you chose to use on your membership form display.

These fields should always display:

- First Name
- Last Name
- Join Date
- Email

If you selected any of these fields, for your Join Form they will display:

- Title
- Initial
- Address 1
- Address 2
- City
- State
- Zip
- Country
- Day Phone
- Evening Phone
- Fax

In addition, any additional fields that you added will display.

Guest Preferences fields: In this section, the guest preferences fields you chose to use on your membership form display.

Guest is new: A check in the box indicates that the guest is a new loyalty group member. This will automatically be checked when the guest joins online.

Modify Loyalty Guest: Click the **Modify Loyalty Guest** button to complete your updates.

Delete Loyalty Guest: Click the **Delete Loyalty Guest** button to remove this guest from the loyalty program. When you click this button, the guest is deleted immediately; there is no confirmation message for the deletion.

Select Promotions: To assign a specific Promotion to a Guest, the desired promotion must be moved from the **Available Promotions** box to the **Selected Promotions** box.

Please see the Promotions section of this User Guide for details on this process.

- View Associated Promotions:** All Promotions associated to this Guest profile are listed here. The following fields display:
- Promotion Code – click on the Promotion Code to display the Promotion Details page
 - Promotion Name
 - Rate Plan – Click on the Rate Plan name to access the Update Rate Plan form
 - From – Starting date the promotion is available for the Guest to book
 - To – End date the promotion is available to book
 - Number of Reservations – Number of reservations this Guest has booked for each promotion.
 - Booked Room Nights – Total number of room nights across all reservations for each promotion.

- When you click the **Delete Loyalty Guest** button, the **Loyalty Guest** table re-displays, less the deleted profile.

How to View Loyalty Program Statistics

The **Loyalty Program Statistics** report provides you with statistics for your loyalty programs for the current calendar year, allowing you to see monthly and overall results for number of guests, bookings, and revenue. These statistics provide you with a tool for measuring the effectiveness of your program, allowing you to see the results of your loyalty program investment.

Access

Use the navigation list to access the **Loyalty Program Statistics** report:

- Select the **Marketing Tools** menu
- Select **Loyalty Program** from the Navigation list (to expand the folder)
- Select **Statistics** from the expanded folder

TC LearningCenter Resort (6719) Contact Us | Logout

Reports | Hotel Setup | Update/Modify | Yield Mgmt | Packages | Group/RFP | Travel Agent | Marketing Tools

PROPERTY LIST (6719)

- Reservation Email Setu
- Manual Delivery
- Marketing Email Tools
- Events Calendar
- Promotional Teaser
- Loyalty Program
 - Loyalty Guests
 - Groups
 - Join Form
 - Additional Form
 - Statistics
 - Email Setup

Loyalty Guests

[Help](#)

View: Join Date Start: Join Date End:

Last Name	First Name	Address	City	State	Zip	Country	Email	Join Date	
Public	John	123 Main Street	Chicago	IL	60601	US	chill@travelclick.net	12/12/2006	Details
Anderson	Michael	3100 Gaston Rd	Sugar Land	TX	77890	US	ma@aol.com	12/06/2006	Details
Peterson	Adam	3100 Richmond Ave	Houston	TX	77098	US	lharvey@travelclick.net	12/06/2006	Details
Smith	Kim	4567 Rustic Hill	Los Angeles	CA	89456	US	ksmith@aol.com	12/06/2006	Details

New Guests are marked **bold**

- The **Loyalty Program Statistics** report displays in the main window.

Your Loyalty Statistics for 2005	
Total Loyalty Guests:	3
New Loyalty Guests:	3
Last month's new Loyalty Guests:	0
AVG New Loyalty Guests p/month:	0.50
Total bookings by Loyalty Guests:	6
AVG bookings p/Loyalty Guest:	2.00
Total bookings with Loyalty Rate:	0
AVG bookings with Loyalty Rate p/month:	0.00
Total Revenue from Loyalty Rate in 2005:	\$0.00
Total Revenue from Loyalty Rate last month:	\$0.00
AVG Revenue from Loyalty Rate p/month:	\$0.00
Conversion of Loyalty Guest to Reservation:	0.00 %

The field descriptions for the **Loyalty Program Statistics** report follow:

- Total Loyalty Guests:** The current total for all guests in the loyalty programs.
- New Loyalty Guests:** The number of new loyalty guests this calendar year.
- Last Month's New Loyalty Guests:** The number of new loyalty guests this past month.
- AVG New Loyalty Guests p/Month:** The average number of new loyalty guests per month this year (new guests this year divided by number of months)
- Total Bookings by Loyalty Guests:** The total number of bookings this year through loyalty programs.
- AVG Bookings p/Loyalty Guests:** The average number of bookings per loyalty guest (total number of bookings this year divided by total number of loyalty guests).
- Total Bookings with Loyalty Rate:** The total number of bookings this year at the loyalty room rate.
- AVG Bookings with Loyalty Rate p/Month:** The average number of bookings per month at the loyalty room rate (The total number of bookings this year to loyalty guests divided by the number of months).

- Total Revenue from Loyalty Rate in yyyy:** The total revenue generated this year for rooms sold at a loyalty program rate.
- Total Revenue from Loyalty Rate Last Month:** The total revenue generated last month for rooms sold to loyalty guests.
- AVG Revenue from Loyalty Rate p/Month:** The average revenue generated per month for rooms sold to loyalty program guests (total revenue generated this year for rooms sold to loyalty guests divided by the number of months).
- Conversion of Loyalty Guest to Reservation:** The percentage of loyalty guests that resulted in bookings this year (total loyalty guests divided by the total bookings by loyalty guests).

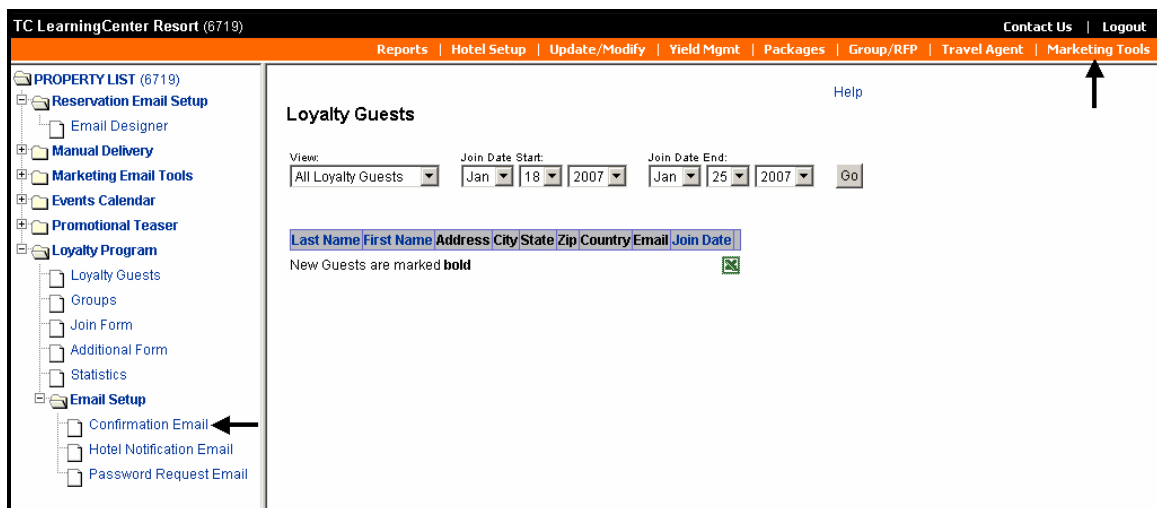
How to Create a Confirmation Message for Loyalty Groups

The **Loyalty Confirmation Email** form allows you to create a standard confirmation email message to be sent to loyalty guests upon their joining a loyalty program online.

Access

Use the navigation list to access the **Loyalty Confirmation Email** form:

- ❑ Select the **Marketing Tools** menu
- ❑ Select **Loyalty Program** from the Navigation list (to expand the folder)
- ❑ Select **Email Setup** from the expanded folder (to expand the folder)
- ❑ Select **Confirmation Email** from the expanded menu



- The **Loyalty Confirmation Email** form displays in the main window.

[Help](#)

Edit Loyalty Confirmation Email

Confirmation email is sent to loyalty guests once they join online.

From:

Cc: (Check here if you want to send a Cc to this address)

Language:

Email Title:

Email Body:

Thank you for joining our Loyalty Program. We are very excited you have chosen to join and are certain you will enjoy all the benefits available to you.

By becoming a member you are now eligible to receive news about exclusive rates, packages and promotions offered only to our Loyalty Program members.

You can book your reservation on-line at

* Quotation marks will be converted to double apostrophes.



The field descriptions and procedures for the **Loyalty Confirmation Email** form follow:

- From:** Enter your corporate or departmental email address. This is the e-mail address from which the guest will receive the e-mail.
- CC:** Enter an email address for someone at the hotel if you want that person to be notified when a loyalty guest joins.
- Language:** ▼ Select a language from the drop-down list.
- Email Title:** Enter a simple subject line that acknowledges receipt of the membership request, such as “Thanks for Joining Our Club”, making sure that you include your hotel name and the loyalty program name.
- Email Body:** Enter the standard text to be included in the message.

Reset: Click the **Reset** button to clear all fields on the **Loyalty Confirmation Email** form.

Submit/Update: Click the **Submit/Update** button to update the confirmation message template.

How to Select Notification Information for Loyalty Groups

The **Loyalty Notification Email** form allows you to select the information you would like to receive when a guest joins one of your loyalty programs.

Access

Use the navigation list to access the **Loyalty Notification Email** form:

- ❑ Select the **Marketing Tools** menu
- ❑ Select **Loyalty Program** from the Navigation list (to expand the folder)
- ❑ Select **Email Setup** from the expanded folder (to expand the folder)
- ❑ Select **Hotel-Notification Email** from the expanded menu

The screenshot displays the 'Edit Loyalty Confirmation Email' interface. On the left, a navigation tree under 'Loyalty Program' has 'Email Setup' expanded, with 'Hotel Notification Email' selected. The main content area shows the following form fields:

- From:** info@travelclick.net
- Cc:** (empty field) (Check here if you want to send a Cc to this address)
- Language:** English (dropdown menu)
- Email Title:** Welcome to our Loyalty Program!!
- Email Body:**

Thank you for joining our Loyalty Program. We are very excited you have chosen to join and are certain you will enjoy all the benefits available to you.

By becoming a member you are now eligible to receive news about exclusive rates, packages and promotions offered only to our Loyalty Program members.

You can book your reservation on-line at

At the bottom of the form are two buttons: **Reset** and **Submit/Update**.

- The **Loyalty Notification Email** form displays in the main window.

[Help](#)

Loyalty Notification Email Setup

Each time a Loyalty Guest joins your Hotel you will receive a notification email, you can configure the notification email at this site.

Enter the email address you would like to send the notification to:

Mail to:

CC:

Select which information you would like to receive:

- Guest Name
- Join Date
- Guest Email
- Guest Phone (home)
- Guest Phone (work)

The field descriptions and procedures for the **Loyalty Notification Email** form follow:

- Mail to:** Enter the corporate or departmental email address that should receive the notification message. This is the e-mail address from whom the guest is going to receive the e-mail.
- CC:** Enter any email address to be copied in on the message.
- Language:** ▼ Select a language from the drop-down list.
- [Information to Receive]:** Click the box (to place a checkmark in it) to select the information that you would like to receive in the notification email:
- Guest Name
 - Join Date
 - Guest Email
 - Guest Phone (home)
 - Guest Phone (work)
- Save:** Click the **Save** button to save your settings.

How to Create a Standard Loyalty Password Request Form

The **Loyalty Password Request Email** form allows you to create a password, and request an email message to be sent to loyalty guests upon their request for a new password generated by the system for a loyalty program.

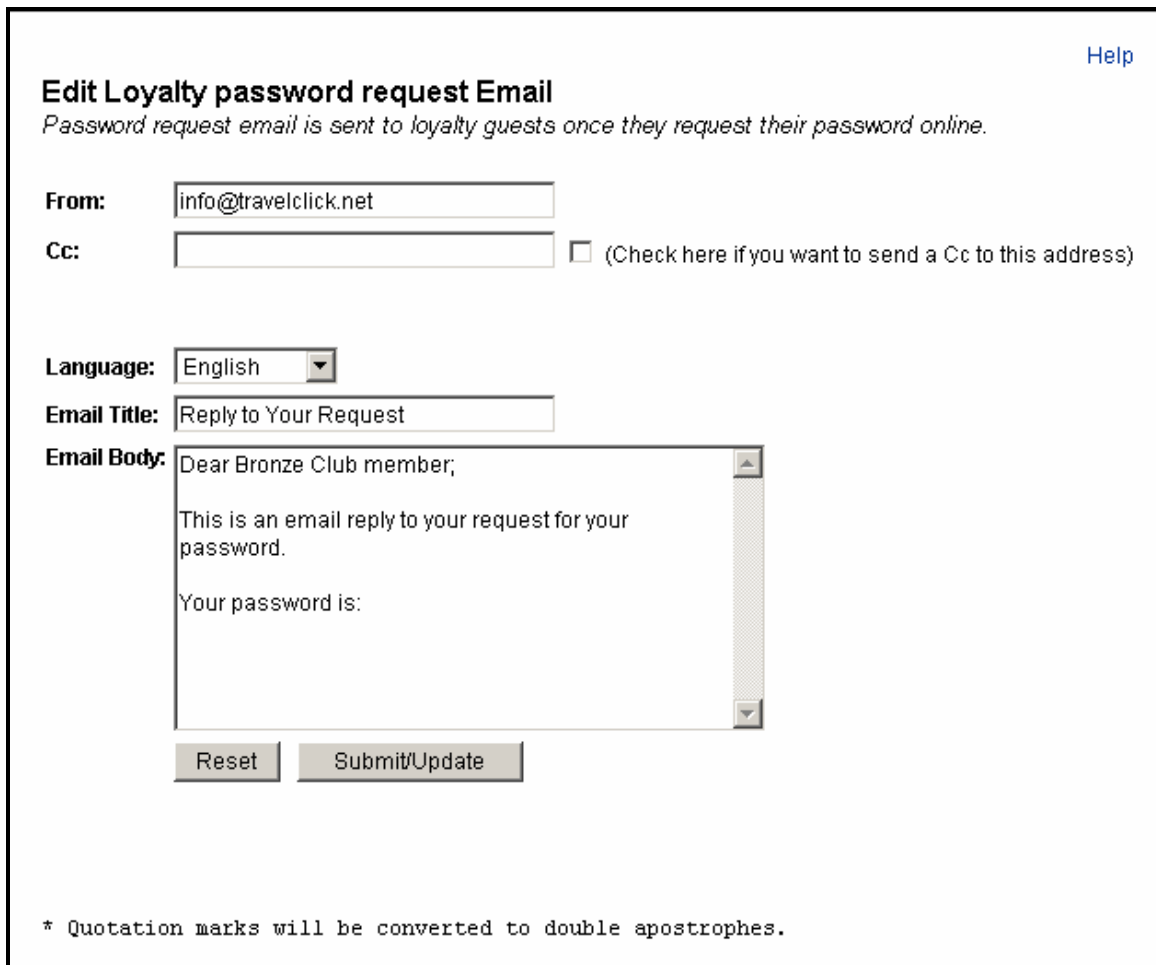
Access

Use the navigation list to access the **Loyalty Password Request Email** form:

- ❑ Select the **Marketing Tools** menu
- ❑ Select **Loyalty Program** from the Navigation list (to expand the folder)
- ❑ Select **Email Setup** from the expanded folder (to expand the folder)
- ❑ Select **Password Request Email** from the expanded menu



- The **Loyalty Password Request Email** form displays in the main window.



[Help](#)

Edit Loyalty password request Email

Password request email is sent to loyalty guests once they request their password online.

From:

Cc: (Check here if you want to send a Cc to this address)

Language:

Email Title:

Email Body:

* Quotation marks will be converted to double apostrophes.

The field descriptions and procedures for the **Loyalty Password Request Email** form follow:

- From:** Enter your corporate or departmental email address. This is the email address from which the guest will receive the email.
- CC:** Enter any email address to be copied in on the message. The checkbox to the right of this field allows you to retain the CC address but select it as needed.
- Language:** ▼ Select a language from the drop-down list.
- Email Title:** Enter a simple subject line that acknowledges receipt of the password request, such as “Your Request for Information”. In this case, you may want to keep the title somewhat confidential.
- Email Body:** Enter the standard text to be included in the message.

Reset: Click the **Reset** button to clear all fields on the **Loyalty Password Request Email** form.

Submit/Update: Click the **Submit/Update** button to update the confirmation message template.

Loyalty Promotions

Loyalty Promotions allows a property to offer special rates for Loyalty Guests. These rates are known as promotions and each promotion consists of a rate plan that is then associated to specific Loyalty Guest profiles. When the Loyalty Guest logs in to the Loyalty site, they will be notified via an availability calendar of all Promotions they are eligible to book. Multiple promotions may be made available to loyalty guests and can be controlled through the setting of specific redemption rules.

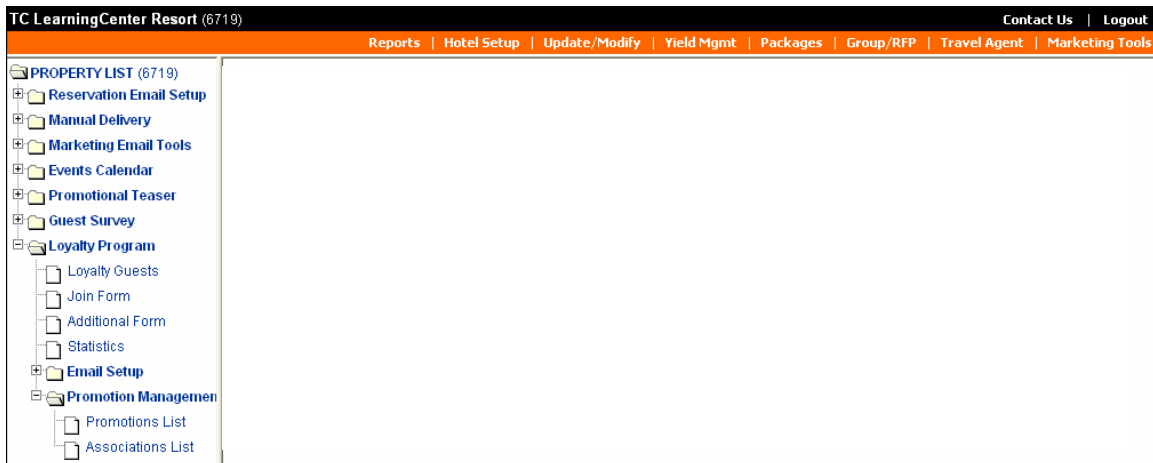
Promotion Management

Promotion Management consists of the Promotions List, Associations List and Promotion Configuration.

Access

Use the navigation list to access the **Loyalty Program** table:

- Select the **Marketing Tools** menu
- Select **Loyalty Program** from the Navigation list (to expand the folder)
- Select **Promotion Management** to expand the folder



Promotions List

The Promotions List is where Promotions are created, edited and deleted. The list itself can also be sorted to display All Promotions or Active Promotions only.

Access

Use the navigation list to access the **Promotions List**:

- ❑ Select the **Marketing Tools** menu
- ❑ Select **Loyalty Program** from the Navigation list (to expand the folder)
- ❑ Select **Promotion Management** to expand the folder
- ❑ Select **Promotions List**

- The Promotions List displays on the page

The screenshot shows the 'Promotions List' page in the iHotelier system. The navigation menu on the left includes 'PROPERTY LIST (6719)', 'Reservation Email Setup', 'Manual Delivery', 'Marketing Email Tools', 'Events Calendar', 'Promotional Teaser', 'Guest Survey', 'Loyalty Program', 'Loyalty Guests', 'Join Form', 'Additional Form', 'Statistics', 'Email Setup', 'Promotion Management', 'Promotions List', and 'Associations List'. The 'Promotions List' is currently selected. The main content area shows a table of active promotions. At the top, there is a dropdown menu set to 'Active Promotions' and a 'Display it' button. Below the table, there are 'Add New Promotion', 'Update', and 'Delete' buttons.

Promotion Code	Promotion Name	Rate Plan	From	To	Days	Default Color	Active	Sort Order	Delete
1	Bronze Club	Fun n Sun Package	12/09/2005	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
2	Gold Club Members	Gold Club Rate	12/09/2005	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
000001	Default Promotion	Special Rate			M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
4	Bronze Club	Special	08/11/2007	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
5	Bronze Club	Corporate Rate	08/11/2007	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
3	Silver Club Members	Silver Club Rate	12/09/2005	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>

The field descriptions and procedures for the **Promotions List** follow:

Add New Promotion: Click this link to open the **Create New Promotion** form, which allows you to create a new loyalty promotion. After you add a promotion using this form, it displays in the **Promotions List**.

Promotion Code: A Promotion Code is assigned when created. Click on the Promotion Code to access the Promotion Details page where edits can be made.

Promotion Name: The current promotion name displays here. To change the name, click the **Promotion Code** to display the **Promotion Details** page.

Rate Plan: The rate plan for the promotion displays here. Click on the rate plan name to access the **Update Rate Plan** form.

- From:** First date the promotion is available within the availability calendar.
- To:** Last date the promotion is available within the availability calendar.
- Days:** Specific days of the week within the **From/To** dates that the promotion is available within the availability calendar.
- Default:** If the box is checked, the selected promotion is used as the default for the loyalty program. Only one promotion can be selected as a default. One promotion **must** be selected as a default for the guest to be able to make a booking after they have registered online.
To designate a promotion as the default, click the radio button and click the **Update** button at the top or bottom of the Promotions List table.
- Color:** Each promotion is assigned a color that will display in the Availability calendar on days when that offer is available.
- Active:** Promotions that are currently active will display a check in this field. You can activate or inactivate a promotion by checking (activate) or un-checking (inactivate) the box.
- Sort Order:** Determines the order in which Promotions appear in the Promotions list and in the **Availability Calendar Legend**. The lower the number, the higher in the order the promotion appears. To change the Sort Order, delete the existing value, replace with a new value and click **Update**.
- Delete:** To remove an existing promotion from the system, check the box in the Delete column for the corresponding promotion and select Delete at the top or bottom of the list table.
- ⊗ **You can inactivate a promotion rather than having to delete it entirely from the system. (see the Active field above)**

Adding a New Promotion

New promotions can be added upon demand within the Create New Promotions page that is accessible through the Promotions List. Within the Create New Promotions page the promotion details are defined. Items such as availability dates, promotion name, Availability Calendar color coding, rate plan assignment and redemption rules.

Access

Use the navigation list to access the **Promotions List**:

- Select the **Marketing Tools** menu
- Select **Loyalty Program** from the Navigation list (to expand the folder)
- Select **Promotion Management** to expand the folder
- Select **Promotions List**
- Click **Add New Promotion** link

Promotions List

Active Promotions

Add New Promotion

Promotion Code	Promotion Name	Rate Plan	From	To	Days	Default Color	Active	Sort Order	Delete
1	Bronze Club	Fun n Sun Package	12/09/2005	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
2	Gold Club Members	Gold Club Rate	12/09/2005	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
000001	Default Promotion	Special Rate			M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
4	Bronze Club	Special	08/11/2007	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
5	Bronze Club	Corporate Rate	08/11/2007	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
3	Silver Club Members	Silver Club Rate	12/09/2005	08/11/2008	M,Tu,W,Th,F,Sa,Su		<input checked="" type="checkbox"/>	100	<input type="checkbox"/>

Add New Promotion

- The Create New Promotion form displays on the page

Create New Promotion


Promotion Code

Promotion Name

Description

English (US)

Display Text

Display Color 

Promotion Dates Aug 10 2007

to


Mon Tue Wed Thu Fri Sat Sun

Rate Plan RACK

Active

Redemption Rules	Guest Level	Property Level
Max no. of reservations	<input type="text"/>	<input type="text"/>
Max total room-nights	<input type="text"/>	<input type="text"/>
Max room-nights per reservation	<input type="text"/>	
Max total reservation amount	US\$ <input type="text"/>	US\$ <input type="text"/>

The field descriptions and procedures for the **Create New Promotion** form follow:

- Promotion Code:** Enter a Promotion Code. This code is merely used for reference in the Promotions List and for reporting, it does not display to the guests.
- Promotion Name:** Enter the promotion name here. This is for reference on the Promotions List, this does not display to the guests.
- Description:** Enter a description of the promotion that will display on the Availability Calendar page.
- Language:** Select desired language(s) from the dropdown menu
- Display Text:** Enter the promotion name or call to book that will display with the color code assigned on the Availability Calendar page
- Display Color:** Select a color to designate this rate plan on the Availability Calendar. To select a color, click the  to view the color chart then click on a color box to select.

- Promotion Dates:** Enter the promotion availability dates from the drop down menus. Advise any day of the week restrictions by selecting the specific day of the week checkbox. If all days are left unchecked then the promotion will be available all seven days of the week.
- Rate Plan:** Select the rate plan for the promotion from the drop down menu
- Active:** To activate the promotion upon creation, click the active box. You do not have to activate a promotion right away. You can also activate the promotion from the Promotions List at a later date.
- Redemption Rules:** Defines the overall availability of the promotion once pre-defined limits have been met. You can assign Redemption Rules at a Guest Level and/or at a Property Level. The specific rules follow this definition.
- Max. No. of Reservations:** Enter the maximum number of reservations that an individual guest can make utilizing this promotion and/or the maximum number of reservations of this promotion allowed by your property as a whole.
- Max total room nights:** Enter the maximum number of room nights that an individual guest can book utilizing this promotion and/or the maximum number of room nights this promotion is allowed by your property as a whole. This is as a whole, not for an individual reservation.
- Max room nights per reservation:** Enter the maximum number of room nights that an individual guest can book within 1 reservation utilizing this promotion.
- Max total reservation amount:** Enter the maximum allowed dollar amount, per guest reservation, for this promotion and/or the maximum allowed dollar amount sold by your property, across all reservations, for this promotion.
- Create:** Click the create button to save the promotion. Once saved, the promotion is added to the Promotions List.

Associations List

Promotions are activated for Loyalty members through the creation of an association via the Associations List. The Association List form contains two distinct areas: Upload Associations where multiple loyalty guest profiles and promotions can be linked with a spreadsheet upload and Associations View which provides a list of existing profile and association links as well as the ability to delete an association.

Note: Associations can also be linked to a profile through the Loyalty Guest Details page. The process to add associations through this page is defined after the Associations List information.

Access

Use the navigation list to access the **Associations List**:

- Select the **Marketing Tools** menu
- Select **Loyalty Program** from the Navigation list (to expand the folder)
- Select **Promotion Management** to expand the folder
- Select **Associations List**

- The Associations List form displays on the page

The screenshot shows the 'Associations List' page in the iHotelier system. The left sidebar contains a navigation tree with 'Promotion Management' expanded to show 'Associations List'. The main content area has a header with navigation links: Reports, Hotel Setup, Update/Modify, Yield Mgmt, Packages, Group/RFP, Travel Agent, Marketing Tools, Contact Us, and Logout. Below the header, the 'Associations List' page is divided into two sections: 'Upload Associations' and 'View Associations'. The 'Upload Associations' section includes a file upload field with 'Browse...' and 'Upload' buttons, and instructions for downloading a template and saving an .XLS file. The 'View Associations' section features a table with columns for Promotion Code, Email ID, Association Date Start, Association Date End, and Method. The table currently shows one row with a 'Display It' button. Below the table, there are 'Delete', 'Select All', and 'Delete' buttons for each row.

Upload Associations

Associations List

Upload Associations

Download template for uploading associations, [Click here](#)

Instructions:

1. Download template and save as .XLS file format.
2. Enter data into spreadsheet according to format specifications in the header (Row 1) and save the .XLS file.
3. Browse for the saved .XLS file and click on Upload.

The field descriptions and procedures for the **Upload Associations** form follow:

File Browse and Upload: Association spreadsheets are uploaded by selecting the Browse button and selecting the spreadsheet for uploading from the computer files. Once selected, the file path automatically enters in the path field. Select Upload to complete the process.

Note: Upon completion of the upload, the system will advise the number of profiles that were both successfully and unsuccessfully added to the system

Upload template: Select the [Click Here](#) link to open the Excel template. Directly below the link are instructions for downloading and uploading the template.

The field descriptions and procedures for the **Upload Template** form follow:

	A	B	C	D
1	Promotion Code(CHAR)(40)	Last Name(CHAR) (40)	First Name (CHAR) (40)	Email Address(CHAR)(100)
2				
3				
4				
5				
6				
7				
8				

Promotion Code: Enter the promotion code desired to link to the guest profile. This is a 40 character maximum field and to insure a successful upload, the promotion name must match the code as shown in the Promotions List and entered in all capital letters.

Last Name: Enter the loyalty guest's last name in all capital letters up to a 40 character maximum.

First name: Enter the loyalty guest's first name in all capital letters up to a 40 character maximum.

Email Address: Enter the loyalty guest’s email address in all capital letters up to a 100 character maximum.

In order to assign multiple promotions to a loyalty guest from an upload, each new promotion must have its own designated line and the guest information will repeat.

	A	B	C	D
	Promotion Code(CHAR)(40)	Last Name(CHAR) (40)	First Name (CHAR) (40)	Email Address(CHAR)(100)
2	2	Maitland	Susan	smaitland@aol.com
3	5	Maitland	Susan	smaitland@aol.com
4	1	Maitland	Susan	smaitland@aol.com
5	2	Garland	Robert	robert345@yahoo.com
6	1	Marshall	Vincent	vmarshall@gmail.com
7				

View Associations

View Associations

Promotion Code **Email ID** **Association Date Start** **Association Date End** **Method**

All Jan 12 2007 Aug 12 2007 All

The field descriptions and procedures for the **View Associations** form follow:

Promotion Code: To view a specific promotion, select the code from the drop down menu. If all promotions are desired, select All.

Email ID: Enter a specific email address to view all promotions linked to that Guest’s profile.

Association Date Start: To view associations linked to a profile between a date range. Enter the start date by selecting from the drop down menu or the calendar selection option.

Association Date End: To view associations linked to a profile between a date range. Enter the end date by selecting from the drop down menu or the calendar selection option.

Method: Select from the dropdown menu to view associations linked through the Guest Info Page, Upload or All.

Display it: Click **Display it** to generate the list.

The field descriptions and procedures for the **View Associations** list follow:

View Associations

Promotion Code: All | Email ID: | Association Date Start: Jan 12 2007 | Association Date End: Aug 12 2007 | Method: All | Display It

[Delete](#) [Select All](#)

Promotion Code	Last Name	First Name	Email	Association Date	Method	Delete
5	Pullen	Kristi	kepullen@gmail.com	08/11/2007	Through Guest Info page	<input type="checkbox"/>
3	Pullen	Kristi	kepullen@gmail.com	08/11/2007	Through Guest Info page	<input type="checkbox"/>
2	Pullen	Kristi	kepullen@gmail.com	08/11/2007	Through Guest Info page	<input type="checkbox"/>
4	Pullen	Kristi	kepullen@gmail.com	08/11/2007	Through Guest Info page	<input type="checkbox"/>
5	Smith	Roger	Rsmith@yahoo.com	08/11/2007	Through Guest Info page	<input type="checkbox"/>
4	Hale	Linda	lharvey@travelclick.net\$	08/11/2007	Through Guest Info page	<input type="checkbox"/>

Once generated, the View Associations list can be sorted by clicking the title in the header column of the desired criteria.

Promotion Code: The Promotion associated to the loyalty guest profile.

Last Name: Loyalty guest last name

First Name: Loyalty guest first name

Email: Loyalty guest email

Association Date: Date the Promotion was linked to the loyalty guest profile.

Method: The method by which the associated was made. Upload or Through Guest Info page display in this column.

Select All and Delete: To delete an Association between a promotion and specific guest profile check the box at the end of the row and click the **Delete** button. To delete all profiles in the list, click **Select All** and then **Delete**.

Creating Associations through Guest Info Page

Promotions can be associated to a Guest Profile individually through the **Select Promotions** area of **Guest Info Page**.

Use the navigation list to access the **Guest Info Page**:

- Select the **Marketing Tools** menu
- Select **Loyalty Program** from the Navigation list
- Select **Loyalty Guests** to expand the folder
- Select **View, Join Date Start and Join Date End** fields to display the **Loyalty Guests list**
- Select **Details** on the line of the desired Loyalty Guest

TC LearningCenter Resort (6719) Contact Us | Logout

Reports | Hotel Setup | Update/Modify | Yield Mgmt | Packages | Group/RFP | Travel Agent | Marketing Tools

PROPERTY LIST (6719)

- Reservation Email Setup
- Manual Delivery
- Marketing Email Tools
- Events Calendar
- Promotional Teaser
- Guest Survey
- Loyalty Program
 - Loyalty Guests
 - Join Form
 - Additional Form
 - Statistics
 - Email Setup
 - Promotion Management

Loyalty Guests

View: All Loyalty Guests | Join Date Start: Aug 6 2007 | Join Date End: Aug 13 2007 |

Last Name	First Name	Address	City	State	Zip	Country	Email	Join Date	
La Montagne	Shawna	3241 Fox	DeKalb	Illinois	60517	USA	sboyce@travelclick.net	08/13/2007	Details
Mattland	Susan	3456 Park Row	Miami	Florida	56789	USA	TEST@AOL.COM	08/13/2007	Details
Harvey	Luz	4930 Cloudcliff Ln	Houston	Texas	77494	USA	lharvey@travelclick.net	08/13/2007	Details

New Guests are marked **bold**

The Guest Info page displays

Loyalty Guest Modify

First Name:
 Last Name:
 Join Date:
 Email:
 Address1:
 Address2:
 City:
 Zip:
 Day Phone:
 Evening Phone:
 State:
 Country:

Do you prefer Smoking or Nonsmoking?:
 Do you prefer High or Lower Floor?:
 Do you prefer feather or foam pillows?:
 Comments:

Guest is new:

Select Promotions:

Available Promotions

- Bronze Club
- Bronze Club
- Default Promotion
- Gold Club Members
- Silver Club Members

Selected Promotions

- Bronze Club

View Associated Promotions

Promotion Code	Promotion Name	Rate Plan	From	To	No. of Reservations	Booked Room-nights
1	Bronze Club	Fun n Sun Package	12/09/2005	08/11/2008	0	0

The Select Promotions area of the Guest Info page is where Promotions are added to a guest profile. Promotions listed in the Available Promotions field must be moved to the Selected Promotions field for the promotion to be activated for this Loyalty Guest.

Select Promotions:

Available Promotions

- Bronze Club
- Bronze Club
- Default Promotion
- Gold Club Members
- Silver Club Members

Selected Promotions

- Bronze Club

> Insert >

< Remove <

The field descriptions and procedures to **Select Promotions** follow:

- Available Promotions:** All active promotions for the property are listed here. To select a promotion for the guest, click on the promotion name and then **Insert**.
- ⊗ To save time, multiple promotions can be selected by holding the CTRL key down on the keyboard and clicking the mouse on the desired promotions.
- Insert:** Once all desired promotions are selected from the Available Promotions field, click Insert to add them to the Selected Promotions field.
- Remove:** Promotions already active for a loyalty guest can be removed from a Guest profile by selecting the promotion(s) from the **Selected Promotions** field and clicking **Remove**.
- Selected Promotions:** All active promotions for the Loyalty Guest are listed here. To remove a promotion for the guest, click on the promotion name and then **Remove**.
- ⊗ To save time, multiple promotions can be selected by holding the CTRL key down on the keyboard and clicking the mouse on the desired promotions.

Below the Selected Promotions is the View Associated Promotions list. This list recaps all activated promotions for this Guest Profile.

View Associated Promotions						
Promotion Code	Promotion Name	Rate Plan	From	To	No. of Reservations	Booked Room-nights
2	Gold Club Members	Gold Club Rate	12/09/2005	08/11/2008	1	2
3	Silver Club Members	Silver Club Rate	12/09/2005	08/11/2008	0	0
5	Bronze Club	Corporate Rate	08/11/2007	08/11/2008	0	0

The field descriptions for the View Associated Promotions list follow:

- Promotion Code:** Click on the Promotion Code to display the Promotion Details page
- Promotion Name:** Name of the Selected Promotion
- Rate Plan:** The rate plan selected for the promotion. Click on the Rate Plan name to access the Update Rate Plan form
- From:** Starting date the promotion is available for the Guest to book.
- To:** End date the promotion is available to book
- Number of Reservations:** Number of reservations this Guest has booked for each promotion.
- Booked Room Nights:** Total number of room nights across all reservations for each promotion.

How to Filter Marketing Email Lists for Specific Audiences

Facilities within iHotelier allow you to target your marketing efforts to specific email audiences, through the use of email address filters. The **Setup Marketing Email Filter List** allows you to add, edit, or delete marketing email address filters that will allow you to control email message distribution to recipient groups that you define. The filters allow you to make sure that your marketing messages are sent only to potential buyers by including or excluding guests from your marketing messages based on these factors:

- Geographic location
- Dates or days within a week
- Room type
- Rate type
- Group code
- Total spending
- Daily average spending
- Children

Additional filters allow you to control distribution to travel agencies based on these factors:

- Geographic location
- Date ranges

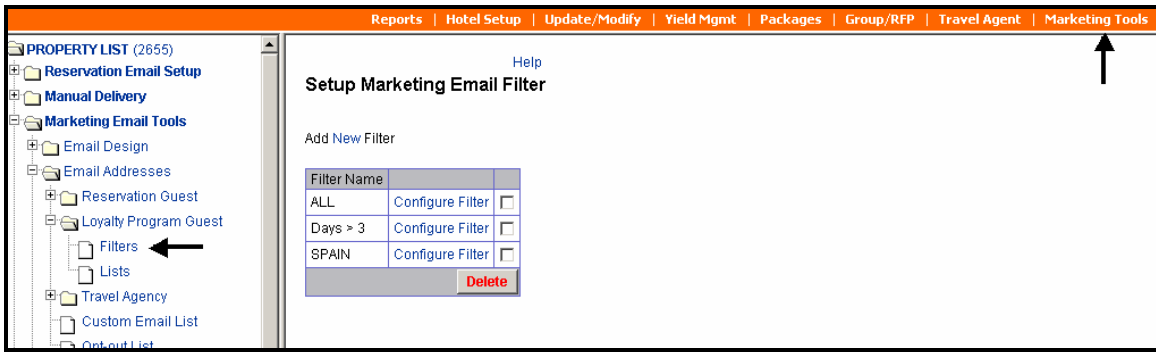
The filters provide you with a means for assuring that your marketing efforts are directed where they have the most impact. For example, a filter could be used to exclude guests and travel agencies located in Chicago, Illinois from a “Come to Chicago” marketing promotion.

Once you apply a filter, you can save the resulting list and review its contents. If you exclude some recipients on the first distribution that you want to include on a second distribution, you can reconfigure the filter to reach the other audiences. If you want to send a second follow-up message to a smaller audience, you can delete names from the saved distribution list.

Access

Use the navigation list to access the **Setup Marketing Email Filter** list:

- Select the **Marketing Tools** menu
- Select **Marketing Email Tools** from the Navigation list (to expand the folder)
- Select **Email Addresses** from the expanded folder (to expand this folder)
- Select the **Loyalty Program Guest** from the expanded folder (to expand this folder)
- Select **Filters** from the expanded folder



- ☑ The **Setup Marketing Email Filter** list displays in the main window.



The field descriptions and procedures for the **Setup Marketing Email Filter** list follow:

Add New Filter: Click **New** to add a new filter; the **Create New Email Filter** form displays. The **New Email Filter** form allows you to enter a filter name and set filter parameters. The procedures for the **New Email Filter** form are included on the pages that follow. As you add new filters, they appear in alphabetic order on the **Setup Marketing Email Filter List**.

Configure Filter: Click **Configure Filter** in the filter’s row to modify the settings for an existing filter.

Delete: Select filters to be deleted by checking the box in the last column. After you have selected all of the filters to be deleted, click the **Delete** button at the bottom right corner of the list to delete the filters. As you delete filters, they will disappear from the **Setup Marketing Email Filter** list.

- ☑ When you click [New](#) in the **Add New Filter** line, the **New Email Filter** form displays. When you click [Configure Filter](#), the **Email Filter Setup** form displays. The layout of these two forms is identical. However, the title, the first field, and the “processing” button vary based on the task.



How to Create a Marketing Email Filter

The **New Email Filter** form allows you to name a filter and add parameters to target your marketing campaign to potential buyers. The Travel Agency filters additionally allow you to target distribution to travel agencies based on similar parameters.

Access

There is no direct access to the **New Email Filter** form from the navigation list. It can only be accessed through the **Setup Marketing Email Filter Design** screen by clicking [New](#) in the **Add New Filter** line.

- ☑ The **New Email Filter** form displays in the main window. An additional section displays at the bottom of this form for Travel Agency filters. The sample that follows is for Travel Agency filters.

[Help](#)

Create New Email Filter

Filter Name:

Filter For Guest:

City:	<input type="text" value="Chicago"/>	Room Type:	<input type="text"/>
State/Province:	<input type="text"/>	Rate Type:	<input type="text"/>
Country:	<input type="text"/>	Group Code:	<input type="text"/>
Date From:	<input type="text"/>	Total Spending:	<input type="text"/>
Date To:	<input type="text"/>	Daily Avg Spending:	<input type="text"/>
Days:	<input type="text"/>	Children:	<input type="text"/>

* You can use a **comma-delimited** list for city, state, country, roomtype, ratetype and groupcode.

Use "mm/dd/yyyy" format for DateFrom and DateTo.
Use numbers for Days, Total Spending, Average Spending, and Children.

* EQ means Equal
GT means Greater Than
LT means Less Than
GTE means Greater Than or Equal
LTE means Less Than or Equal
NEQ means Not Equal

The **New Email Filter** form uses logical operators for filtering guests and travel agents by field entry. Each field uses only the logical operators that apply to it. The full list of logical operators and their meanings follows:

EQ = Equals	GT = Greater than	GTE = Greater than or equal
NEQ = Not equal	LT = Less than	LTE = Less than or equal

If you need to use multiple entries to filter a field, use a comma between each entry. For example, if you wanted to only send an email to people who live in the state of New York, you could set the logic operator to "EQ" and type the following in the **State/Province** field:

New York, NY, N.Y.

You can also use this feature to limit city to multiple cities. For example, to limit by Los Angeles and San Francisco, set the logic operator to "EQ" and type the following into the **City** field:

Los Angeles, L.A., San Francisco

The field descriptions and procedures for the **New Email Filter** form follow:

Filter Name: Enter a unique name for the new filter.

Filter for Guest: For any of the following fields, select an operator and enter the items to be included in the filtering:

City: Select EQ or NEQ and enter the city or cities

State/Province: Select EQ or NEQ and enter the state(s) or province(s)

Country: Select EQ or NEQ and enter the country or countries

Date From: Select GE or GTE and enter the starting date in MM/DD/YYYY format

Date To: Select LT or LTE and enter the end date in MM/DD/YYYY format

Days: Select GT, LT, GTE, LTE, NEQ, or EQ and enter the number of days

Room Type: Select EQ or NEQ and enter the room type(s)

Rate Type: Select EQ or NEQ and enter the rate type

Group Code: Select EQ or NEQ and enter the group code

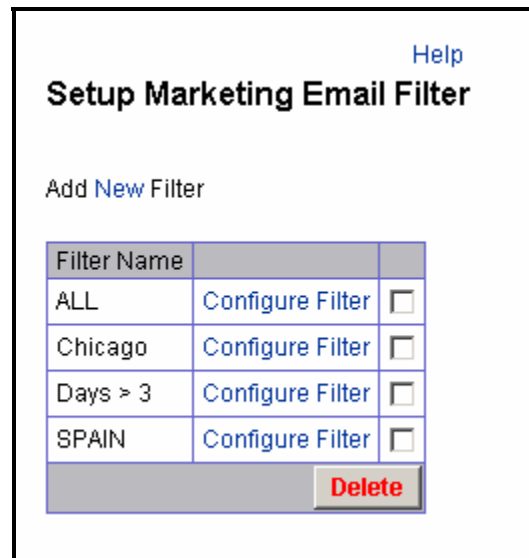
Total Spending: Select GT, LT, GTE, LTE, NEQ, or EQ and enter the total spending as a number that matches the guest's spending amount on file

Daily Avg Spending: Select GT, LT, GTE, LTE, NEQ, or EQ and enter the total spending as a number that matches the guest's spending amount on file

Children: Select GT, LT, GTE, LTE, NEQ, or EQ and enter the total number of children

Add New: Click the **Add New** button to add the filter to the **Setup Marketing Email Filter** list.

- The **Setup Marketing Email Filter** displays with the new filter added into the alphabetic list.



Help

Setup Marketing Email Filter

[Add New Filter](#)

Filter Name		
ALL	Configure Filter	<input type="checkbox"/>
Chicago	Configure Filter	<input type="checkbox"/>
Days > 3	Configure Filter	<input type="checkbox"/>
SPAIN	Configure Filter	<input type="checkbox"/>

[Delete](#)

How to Edit Your Marketing Email Filters

The **Edit Email Filter Setup** form allows you to update an existing filter to target your marketing messages to guests and travel agencies.

Access

There is no direct access to the **Email Filter Setup** form from the navigation list. It can only be accessed through the **Setup Marketing Email Filter Design** screen by clicking the **Configure Filter** link for the filter to be configured.

- ☑ The **Edit Email Filter Setup** form displays in the main window. This form is identical for Reservation Guests filters and Loyalty Program Guests filters.

[Help](#)

Email Filter Setup (Days > 3)

Select Filter:

City: <input type="text" value="EQ"/>	Room Type: <input type="text" value="EQ"/>
State/Province: <input type="text" value="EQ"/>	Rate Type: <input type="text" value="EQ"/>
Country: <input type="text" value="EQ"/>	Group Code: <input type="text" value="EQ"/>
Date From: <input type="text" value="GT"/>	Total Spending: <input type="text" value="GT"/>
Date To: <input type="text" value="LT"/>	Daily Avg Spending: <input type="text" value="GT"/>
Days: <input type="text" value="GT"/> 3	Children: <input type="text" value="GT"/>

* You can use a **comma-delimited** list for city, state, country, roomtype, ratetype and groupcode.

Use "mm/dd/yyyy" format for DateFrom and DateTo.
Use numbers for Days, Total Spending, Average Spending, and Children.

* EQ means Equal
GT means Greater Than
LT means Less Than
GTE means Greater Than or Equal
LTE means Less Than or Equal
NEQ means Not Equal

The **Edit Email Filter Setup** form, like the **New Email Filter** form, uses logical operators for filtering guests and travel agents by field entry. Each field uses only the logical operators that apply to it. The full list of logical operators and their meanings follows:

EQ = Equals	GT = Greater than	GTE = Greater than or equal
NEQ = Not equal	LT = Less than	LTE = Less than or equal

If you are limiting a field with multiple entries, use a comma between each entry. For example, you can use this to enter city information in multiple formats such as "New York, NY, N.Y." You can also use this feature to limit city to multiple cities. For example, to limit by Los Angeles and San Francisco, enter "Los Angeles, San Francisco" in the **City** field.

The field descriptions and procedures for the **Edit Email Filter Setup** form follow:

Select Filter: ▼ Select the filter to be updated from the drop-down list.

Filter for Guest: For any of the following fields, select an operator and enter the items to be included in the filtering:

City: Select EQ or NEQ and enter the city or cities

State/Province: Select EQ or NEQ and enter the state(s)

Country: Select EQ or NEQ and enter the country or countries

Date From: Select GE or GTE and enter the starting date in MM/DD/YYYY format

Date To: Select LT or LTE and enter the end date in MM/DD/YYYY format

Days: Select GT, LT, GTE, LTE, NEQ, or EQ and enter the number of days

Room Type: Select EQ or NEQ and enter the room type(s)

Rate Type: Select EQ or NEQ and enter the rate type

Group Code: Select EQ or NEQ and enter the group code

Total Spending: Select GT, LT, GTE, LTE, NEQ, or EQ and enter the total spending as a number that matches the guest's spending amount on file

Daily Avg Spending: Select GT, LT, GTE, LTE, NEQ, or EQ and enter the total spending as a number that matches the guest's spending amount on file

Children: Select GT, LT, GTE, LTE, NEQ, or EQ and enter the total number of children

Update: Click the **Update** button to update the filter. A confirmation box displays; click OK to accept the changes.

- The **Edit Email Filter Setup** form re-displays, allowing you to configure other filters, if needed.

How to View, Export, and Delete Marketing Email Lists

When filters are used to target email-marketing messages, the filter can be used to create a list that can then be viewed and modified. A **Marketing Email List** table lists all email distribution groups for the list type in alphabetic order. The table allows you to add a new list, view an existing list, export the list to another application (e.g., Excel spreadsheet), or delete the list.

There are three separate **Marketing Email Lists** tables, one for each of the following folders:

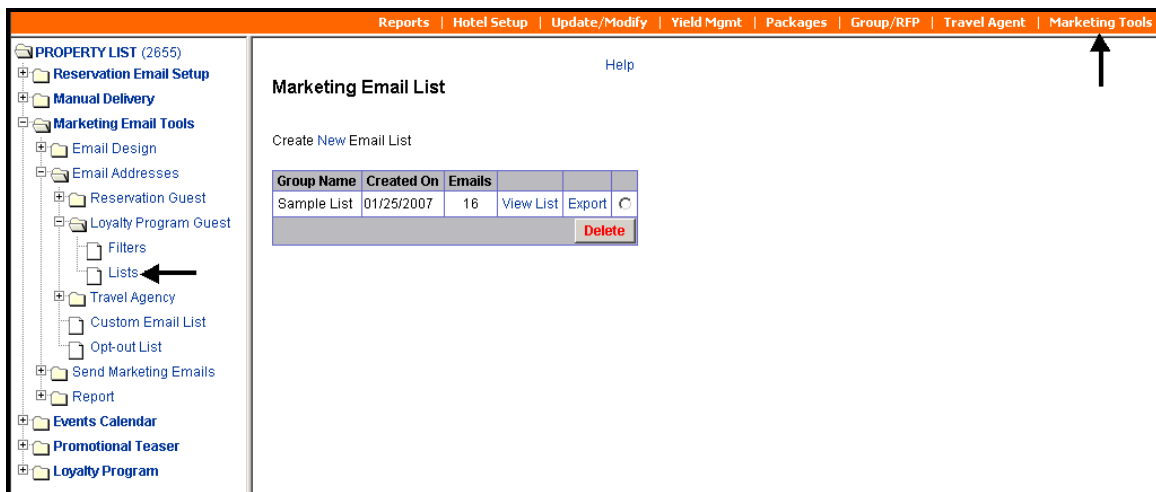
- ❑ Reservation Guests
- ❑ Loyalty Program Guests (this is a separate module that can only be viewed if the hotel subscribes to loyalty programs)
- ❑ Travel Agencies

All three tables are identical in structure.

Access

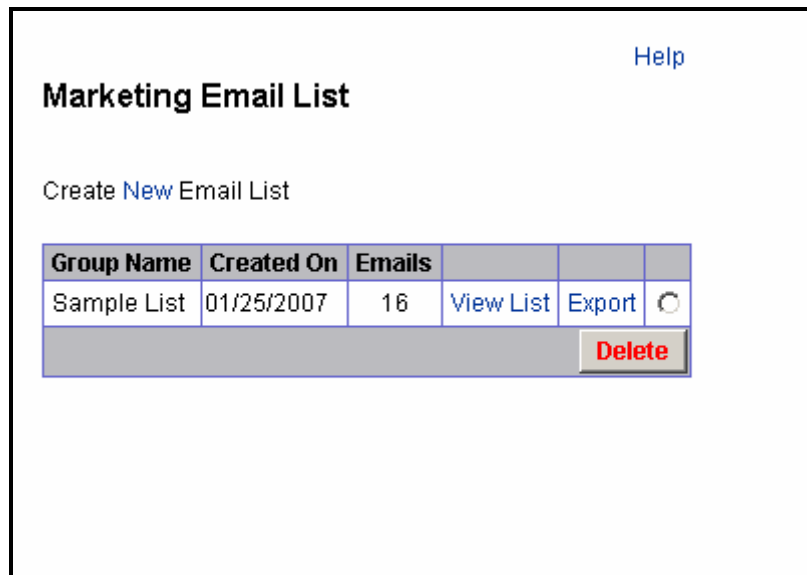
Use the navigation list to access the **Marketing Email List** table:

- ❑ Select the **Marketing Tools** menu
- ❑ Select **Marketing Email Tools** from the Navigation list (to expand the folder)
- ❑ Select **Email Addresses** from the expanded folder (to expand this folder)
- ❑ Select **Loyalty Program Guest** from the expanded folder (to expand this folder)
- ❑ Select **Lists** from the expanded folder



The screenshot shows the iHotelier interface. The top navigation bar includes: Reports | Hotel Setup | Update/Modify | Yield Mgmt | Packages | Group/RFP | Travel Agent | Marketing Tools. The left sidebar shows a tree structure: PROPERTY LIST (2655) > Reservation Email Setup > Manual Delivery > Marketing Email Tools > Email Design > Email Addresses > Reservation Guest > Loyalty Program Guest > Filters > Lists. The main window displays the 'Marketing Email List' table. The table has columns: Group Name, Created On, Emails, View List, Export, and a Delete button. The table contains one row: Sample List, 01/25/2007, 16. A 'Create New Email List' link is above the table. A 'Help' link is in the top right corner of the main window.

- The **Marketing Email List** table displays in the main window.



The field descriptions and procedures for the **Marketing Email List** follow:

Create New Email List: Click [New](#) to display the **New Email List** form. The **New Email List** form allows you to create an email distribution list based on a filter.

The procedures for the **New Email List** form are included on the pages that follow. As you add new lists, they appear in alphabetic order on the **Marketing Email List** table.

Group Name: The list names for your property display in this column in alphabetic order.

Created On: The date that the list was created, in MM/DD/YYYY format.

Emails: The number of email addresses included in the email list.

View List: Click [View List](#) to view the Setup Marketing Email List. There are two variations of the email list:

1. A Reservation Guest list or a Loyalty Program Guests list displays the email address, first name, and last name for each guest on the list.
2. A Travel Agency list displays the email address and name of each Travel Agency/Agent on the list.

Export: Click [Export](#) to export the list as an Excel file.

- ☒ To save the file directly to your computer, right-click the [Export](#) link and select **Save Target As...** from the pop-up menu. Choose a location and click **Save**.

Delete: Select lists to be deleted by clicking the option in the last column. After you have selected all of the lists to be deleted, click the **Delete** button at the bottom right corner of the list to delete the lists. As you delete lists, they will disappear from the **Marketing Email List**.

- ☑ When you click [New](#) in the **Create New Email List** line, the **Create New Email Filter** form displays.
- ☑ When you click [View List](#) on the **Marketing Email List**, the **Setup Marketing Email List** table displays.

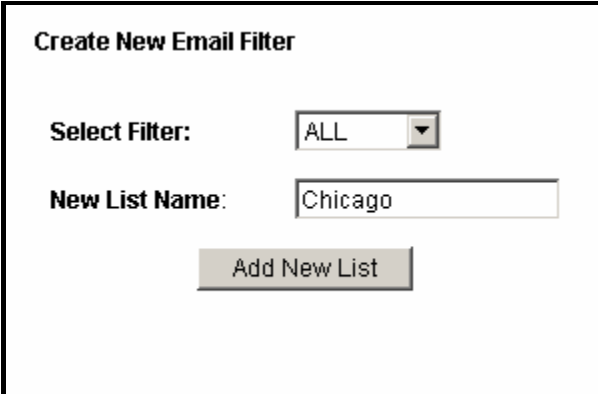
How to Add a Marketing Email List

The **New Email List** form allows you to select a filter and create an email list from it. The **New Email List** form creates a new email list using the selected filter.

Access

There is no direct access to the **New Email List** form from the navigation list. It can only be accessed through the **Marketing Email List** screen by clicking [New](#) in the **Create New Email List** line.

- ☑ The **New Email Filter** form displays in the main window. This form is identical for Reservation Guests, Loyalty Program Guests, and Travel Agencies.



The field descriptions and procedures for the **New Email Filter** form follow:

- Filter Name:** ▼ Select a filter from the drop-down list. This is the filter that will be used to create your email list.
- New List Name:** Enter a unique list name for this marketing need.
- Add New List:** Click the **Add New List** button to create the list. The new list will be added to the **Setup Marketing Email List** table.

- ☑ The **Marketing Email List** table displays with the new filter added into the alphabetic list.



Marketing Email List

Help

Create [New](#) Email List

Group Name	Created On	Emails			
Chicago	01/26/2007	16	View List	Export	<input type="radio"/>
Sample List	01/25/2007	16	View List	Export	<input type="radio"/>

[Delete](#)

How to View a Marketing Email List and Delete Addresses

The **Setup Marketing Email List** allows you to view the members of an email list. It displays the email address, first name, and last name for each guest on the selected marketing email list. The final column of this list allows you to delete individual email addresses.

Access

There is no direct access to the **Setup Marketing Email List** from the navigation list. It can only be accessed through the **Marketing Email List** table by clicking the [View List](#) link for the selected list.

- ☑ The **Setup Marketing Email List** displays in the main window. If the list contains more than 25 email recipients, a “Result Page” navigation bar displays above the list, noting the number of navigation pages (in parentheses) with links to each page. The format is identical for Reservation Guests and Loyalty Program Guests, showing email address, first name, and last name. The format for Travel Agencies is slightly different, showing email address and the Travel Agency name. The sample that follows is for Reservation Guests.

[Help](#)

Setup Marketing Email List (Chicago)

Email	First Name	Last Name	
123@12.com	fname	lname	<input type="radio"/>
222sun@e5systems.com	222	sun	<input type="radio"/>
333sun@e5systems.com	333	sun	<input type="radio"/>
555sun@e5systems.com	555	sun	<input type="radio"/>
66sun@e5systems.com	666	sun	<input type="radio"/>
ab@a.com	a	b	<input type="radio"/>
c@c.net	Chuck2	Jones	<input type="radio"/>
cj@cj.com	Chuck	Jones	<input type="radio"/>
dsun@e5systems.com	aa	dd	<input type="radio"/>
esun@e5systems.com	erin_M2	sun	<input type="radio"/>
ez@example.com	1	2	<input type="radio"/>
mdietz14@aol.com	Michelle	Ocean	<input type="radio"/>
mdietz14@hotmail.com	Michelle	yellow	<input type="radio"/>
mdietz@travelclick.net	Michelle	Testy	<input type="radio"/>
nzhu@e5systems.com	Nancy	Zhu	<input type="radio"/>
test@test.com	FirstName	lastname	<input type="radio"/>

The field descriptions and procedures for the guest version of the **Setup Marketing Email List** follow:

Email: The email address for the recipient

First Name: The email recipient's first name

Last Name: The email recipient's last name

Delete: Select the option for the email recipient and click the **Delete** button at the bottom of the list to remove the recipient from the email list. A confirmation message displays, notifying you that you are about to delete an email and asking you if you want to continue.

- The **Setup Marketing Email List** re-displays, allowing you to review the modified list and delete other email recipients, if needed.